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ABSTRACT

Beginning in 1978, the Rural Education Program at the Northwest Regional Educational Laboratory developed materials of the Keys to School Boardsmanship Project for local school boards, including 13 workshop packages and 2 films. A policy board, with members from the five northwest state associations of local school boards, defined topics to be developed. Workshop products were devised, field tested, reviewed by users and experts, and revised in accordance with recommendations. Resulting workshops were entitled Board/Administrator Relations; Building Bridges: School Board Members' Political Roles; Communicating with the Community; Conflict: Alternatives To Blowing a Fuse; Effective School Board Meetings; The Educational Management Team; Policy Development (including a film); Policy Is Power; Program Evaluation: School Board Roles; What Do School Boards Do?; School Board Self-Assessment; School Improvement: A Critical Function of School Boards; and Teamwork: The Board and Superintendent in Action (including a film). A "product inventory" describes rationale, objectives/outcomes, instructional methods, materials, time requirements, uses/variations for each workshop. Use of the Keys series was implemented in the northwest states and several other states. The Keys programs were also introduced and demonstrated to personnel and administrators of state associations of local school boards outside the northwest. Workshop services were provided to over 6,000 school board members. (MH)

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FINAL REPORT

OF THE

KEYS TO SCHOOLBOARDSMANSHIP PROJECT

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Submitted by:

The Rural Education Program

NORTHWEST REGIONAL EDUCATIONAL LABORATORY

In fulfillment of Contract No. 400-80-0105

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KEYS TO SCHOOL BOARDSMANSHIP

Northwest Regional Educational Laboratory

RC014319

RURAL EDUCATION PROGRAM--FINAL REPORT OF
THE KEYS TO SCHOOL BOARDSMANSHIP PROJECT

Part I: Overview of Project Activities and Accomplishments

o Origins

In June 1978, the Rural Education Program at the Northwest Regional Educational Laboratory undertook an effort to develop new materials and services for local school boards and their members.

The project grew out of earlier program experiences in working with local school boards in community participation and problem solving initiatives, and from staff perceptions regarding the growing complexity of education governance in recent years. Several years earlier, the Laboratory Executive Director and the Executive Director of the Oregon School Boards Association had discussed the need for training programs and materials for local school boards.

o Proposal Development

A problem and need statement was drafted by program staff early in 1978 and circulated for comment and input from leadership of the five state associations of local school boards in the Northwest region. The executive leadership of these associations were convened at the Laboratory for further input and discussion of project potentials in the spring of that year. At that meeting, association leaders made it clear that this would be a project specifically for school boards, an underserved audience in public education. Further, the project would be conducted with and through the auspices of state associations, the key organizations of local school boards. Finally,

these leaders clearly desired a significant decision-making role in the project, through a project Policy Board mechanism. The Policy Board would be made up of the executive secretary and an officer from each of the five participating state associations.

In view of potentials for national distribution and use of project materials, the National School Boards Association (NSBA) was invited to participate. NSBA selected a representative for the project Policy Board.

o Project Start Up

In initial meetings of the Policy Board, the project focus upon boardsmanship education was determined, and seven broad topic areas were identified for development activities.

A number of consultants were retained to assist program staff conceptualize and review research, conventional wisdom, and current practices in these broad areas.

The program developed specific working agreements with each of the five state associations. Those in Washington and Oregon agreed to assume a greater role in development and pilot testing of materials. Those in Alaska, Idaho and Montana agreed to carry out field testing of materials.

Input from school board members and superintendents was sought for each of the topic areas. The state associations in Washington and Oregon aided in identifying members for these "topic teams." The "practitioner" point of view was immensely helpful in giving shape, form and substance to the topic areas.

Limited pilot testing of workshop designs and materials was initiated in the fall of 1978 at annual conferences of the state associations. In addition, a survey validation of the seven topics was completed at these conferences, with a broad cross-section of school board members in each state.

o Pilot Testing

Further development and pilot testing occurred in the winter and spring of 1979, culminating in a summer conference with personnel from the five state associations. At the conference, progress in development was reviewed and association personnel, many of whom had ongoing responsibility for training programs, were provided opportunities to experience some of the workshop procedures and materials produced to date.

In the fall and winter of 1979 pilot testing increased with a wider array of workshop topics and materials. The program now had a new Director, Dr. Robert Bates, who assumed the administrative responsibilities.

o Field Testing

Field test versions of ten workshop programs were produced in the spring of 1980, and planning was initiated to train association personnel to use them. This implementation step took two distinct directions, depending upon the staff capabilities of the associations. For three associations which had staff personnel assigned and responsible for training services, implementation took

the form of providing orientation, directly or indirectly, to these people. In the case of the smaller associations, without staff/training service capability, collaborative relationships with other organizations needed to be developed in order to secure a training capability. In one case, the College of Education of the major state university was invited to participate with the state association in providing training services. In another case, the association utilized the services of a retired superintendent, on a consultant basis, to provide training services using the new products.

Each association made a substantial commitment and contribution to field testing the workshop products, and gave evaluative informaton regarding the final revisions.

o Dissemination

In the fall of 1981, in collaboration with NSBA, the program initiated a limited number of out-of-region activities, designed to provide the materials and services to state associations which had not participated in the development efforts. These efforts were also planned to try out various approaches to training association trainers in the use of the Keys products, an activity with which NSBA would be increasingly involved. The state associations in Arizona and California provided opportunities to try out several approaches.

Program and NSBA staff collaborated in making presentations to the national group of State Association Executive Leadership in January 1982, and in introducing the Keys materials to leaders and trainers representing 12 state associations in February 1982 in

St. Louis, Missouri. Since that time, NSBA has introduced the material to ten additional state associations, through similar regional meetings, and through working more intensively with single state associations.

o Summary

Impacts. Since 1978, the program has accomplished the following:

-- Produced 13 workshop packages, containing more than 20 distinct workshop programs

-- Produced two 16mm films to be used in workshop programs

-- Successfully implemented the broad use of the Keys series with the five state associations in the Northwest

-- Successfully implemented selected Keys programs with two out-of-region state associations

-- Introduced and demonstrated Keys programs to the national group of state association executive directors

-- Introduced and demonstrated Keys programs to 12 additional out-of-region state association personnel

-- NSBA has introduced and demonstrated Keys programs to an additional eight state associations

-- NSBA has successfully implemented selected Keys programs with three state associations

-- Provided workshop services to more than 6,000 school board members

Part II: Significant Features of the Project

This part of the report describes in more detail the Key features, relationships and procedures of the Project.

- o Policy Board and Working Agreements with State and National Associations

The program early determined that a close partnership relationship with the participating state associations was desirable. Indeed, in retrospect, the project would have been unable to function without these, since state associations play a key gatekeeping role with respect to their members. State association leadership exerted a strong decision making role in the project through the Policy Board. More than an advisory committee, the Policy Board gave considerable shape to the project, in terms of decisions about:

- -- Topics to be developed
- -- The nature and flexibility of materials
- -- Review and approval of products at various stages of development
- -- The plan for national dissemination of materials

In addition to participation at the policy level of the project, state associations individually played key roles in development and testing activities. These roles were identified, described and carried out under terms of working agreements between the program and each association. During the conceptualization and early developmental period, the Oregon and Washington associations provided staff time and effort and helped to convene groups of board members

and superintendents to give impact to the topics and key areas of need. During the pilot testing phases of the project, each association provided opportunities, and in some cases, staff assistance, for program staff tryouts of workshop procedures and materials. During the field test phases of the project, associations geared up to take on greater training responsibilities themselves, identified staff personnel to be involved, scheduled workshop sessions within their states, and provided evaluative feedback about the format and performance of Keys products.

o Development Procedures and Participants

The Policy Board identified boardsmanship education as the focus for project efforts and activities. It further defined boardmanship by describing seven broad topics areas for development. These were:

-- Time Management. Techniques, information and procedures on how to utilize the scarce time of board members efficiently

-- Effective Board Meetings. Information and procedures for making board meetings productive and efficient

-- Board-Superintendent Relations. Information and procedures for clarifying board and administrator roles in decision making and communication

-- Policy Making. Information, skills and procedures for identifying policy needs, and for formulating policies

-- Evaluation. Information about and roles the board can play in evaluating educational programs, personnel and board effectiveness

-- The Board Member as Statesman. Information about the board's role in the political and legislative process at the state and national levels

-- Communicating with the Community. Information and techniques for board members as representatives of the school to the community and of the community to the school

The importance of these topics to school board members was tested and validated at annual conferences of the five state associations in the fall of 1978, with the following results:

SURVEY RESULTS FROM STATE SCHOOL BOARD ASSOCIATION CONVENTIONS

November - December 1978

Topic	Combined Percentage of Respondents Indicating High and Moderate Interest				
	Oregon	Washington	Alaska	Idaho	Montana
Time Management	66%	69%	79%	67%	72%
Effective Board Meetings	88%	82%	79%	84%	87%
Board-Superintendent Relations	82%	85%	68%	75%	88%
Policy Making	88%	80%	73%	83%	93%
Evaluation	89%	92%	84%	84%	83%
Legislative Process	75%	62%	79%	75%	83%
Communicating With the Community	94%	95%	84%	88%	89%
Number Responding to Survey	109	96	19	139	93

With the assistance of association leadership in Oregon and Washington, "topic teams," groups of eight to twelve school board members and superintendents, were convened around each topic area. Led by program and association staff, these groups discussed the important and problematic aspects of each of these areas, giving further direction and focus to development activity.

In addition, both the Oregon and Washington associations convened "state review committees," whose members were drawn from leadership roles of statewide education organizations, including:

-- The state education agency

-- The state superintendents' organization

-- Departments of Education of institutions of higher education

-- Regional education service agencies

These state review committees were apprised of the project and its purposes, and were asked by program and association staff to give suggestions and input to topics.

o Use of Consultants and Searches

Once the broad topics for development were identified, program staff conducted extensive electronic searches of several data bases for research literature on school governance, boardsmanship, and each discrete area. These searches revealed a relatively thin research base in regards to school boards and their operation, although several key documents proved to be extremely useful.

Program staff also contracted with several consultants, identified by the Policy Board and other sources, to develop idea and review papers in the topics for development. These consultants were selected primarily for their working knowledge of school boards.

o Pilot Test Activities

Pilot tests of products were defined by the project to be those initial tests carried out by program staff to validate product content, to try out workshop designs, and to find an appropriate mix of media (print, visual, and verbal) for the intended audience. Often, pilot testing was constrained by time limitations, so that only portions of total workshops could be tested.

Pilot testing was typically carried out at annual conferences of state associations in clinic or workshop sessions. Some were carried out at regional meetings, and a few were carried out with individual boards.

Pilot testing of products resulted in revisions in workshop designs, participant materials, and the use and variety of media. From these revisions, the field test versions of products were produced.

o Field Testing of Products

The key question during the field test was that of usability of products by association personnel. Thus, field testing was carried out by personnel of the five state associations and their evaluative feedback was based upon their actual use of the products.

Field testing required some kind of orientation and "trainer training," in order to prepare association personnel to use the products.

Program staff designed several approaches to resolve this problem, including:

-- A demonstration/critique approach, in which a program staff member accompanied association personnel in delivering a series of workshops in one part of the state. The program staff member would deliver the first workshop in the series, with association staff observing and participating. Following the presentation, a critique session would be held. The next workshop in the series would be delivered by one of the association staff members, again followed by a critique.

-- A review/practice approach, in which program staff would meet with association personnel, intensively over a several day period, to review all products, demonstrate portions of workshops, and provide opportunities for association staff to simulate the presentation of a workshop

Each of the five state associations took an active role in field testing products, and provided valuable evaluative information to program staff regarding the final revision of products.

One of the by-products of this mode of field testing was the strengthening of the associations' training services, since they now had new materials, planned and carried out more workshop activities, and in some cases, provided services in areas of the states which had been heretofore underserved.

o Numbers of Participants and Concluding Observations About Testing

During pilot and field testing phases of the project, program records show that more than 6,000 school board members and administrators participated in Keys workshops and evaluated them highly. This data demonstrates clearly that a considerable amount of service can be provided during the development period for new products, while at the same time meeting the needs of developers for evaluative information. It also demonstrates that school board members are an extremely receptive and responsive audience for this kind of service, as long as it is provided under the auspices of their organizations, the state associations.

Finally, the experience shows that state associations can expand and strengthen training services to their members, as a result of having new materials available to them.

Part III: Reviews of Keys Materials

During FY 1982, program staff planned and carried out three formal reviews of the materials, then in the field test form. These reviews were designed to gather evaluative information from three distinct frames of reference, including:

- A "user" frame of reference, as represented by those state association personnel who had actually implemented and used the materials in delivering services to school board members in their respective states
- A "dissemination/marketing" frame of reference, as represented by staff of the National School Boards Association, which had expressed interest in marketing the materials nationally
- An "expert" frame of reference, as represented by a scholar known for his concern for and familiarity with school governance problems and issues

The output from these reviews, when added to the already extensive performance data resulting from pilot and field test activities, would provide a sound foundation for carrying out final revisions in the materials prior to turning them over to NSBA for dissemination.

The questions, procedures and outcomes of each review are summarized here.

User Review Panels

In December 1981, each of the five participating state associations of local school boards sent two representatives to a two-day review session. Prior to the session, each participant was

sent a review sheet containing a question which served as a guideline in reviewing workshop materials. The question was:

- Is this notebook sufficiently adaptable to meet your association's needs for the programs and services you intend to offer your members? Please identify specific strengths or improvements in each of the three areas of the notebook.
  --Rationale section
  --Strategy section
  --Leader's Guide section

Each reviewer had a primary responsibility for indepth review of at least two packages, and a secondary responsibility for contributing to the review of others.

During the two-day session, program staff served as facilitators of review group discussions, and as recorders of ideas and suggestions for improvement in the packages.

The outcome of the review session was one of generally great satisfaction with the materials. Participants were especially impressed with the degree of detail with which the manuals were developed, including explanation of the content, specifications of workshop procedures, and nature of participant activities.

Review session participants raised several concerns about some of the manuals. These concerns centered upon the time requirements for some of the workshops, and indicated that a modular organization would allow for greater flexibility in dealing with time constraints.

Another concern related to the way in which association personnel learned how to present the workshops. Some reviewers

indicated that this would best be accomplished by providing prospective workshop leaders an opportunity to view an actual presentation of the workshop prior to their own first attempt.

A third concern was expressed in regard to an overall index or cross-referencing system for all of the materials. This would enable association personnel to easily find materials relating to a topic of interest. In addition, it would make the entire collection more flexible, since activities and resource materials could be identified and reassembled easily.

This discussion led to the identification of a need for a "Keys to the Keys..." cross-referencing document.

Dissemination/Marketing Review

In November 1981, three members of the staff of the National School Boards Association participated with program staff in a two-day review of the Keys materials.

The discussion of NSBA's role in disseminating the materials was already well underway, with the clear anticipation that the materials would be turned over in finished form to NSBA for distribution to state associations nationally. These NSBA personnel had first hand familiarity with the materials, having participated in project dissemination activities in Idaho, Arizona and California during the preceding fall. Each of them had actually used some of the materials in those activities. The questions for review of the materials were:

- Do the activities contribute to the goals and objectives stated for each package?
- Are the materials written in a way which makes them easy to use by those unfamiliar with them?

That NSBA was clearly enthusiastic about the Keys materials even before the review session was evident in a letter, dated November 19, 1981. "Without exception, we believe that the material content of each 'Key' is superior to other material we've seen elsewhere. Simply put, we think the NWREL staff is first rate."

Indeed, rather than content it was format and organization of materials which served as the focus of discussion during the review session. NSBA recommended a six-part organization, to supplant the four-part organization of the field test version. The six-part organization would allow for greater consistency from one manual to another, and would provide additional information to prospective workshop leaders. In some manuals, the workshop procedures needed to be outlined in greater detail. Another concern expressed by the NSBA staff related to the participant materials. These, in their review, should be more "leader dependent," consisting mainly of activity questions, checklists, and the like, but without the information sheets and instructions for activities.

The participant materials would be marketed by NSBA as "consumables," and should be designed to be without value except in the context of a workshop presentation.

Finally, NSBA indicated a desire to revise the 16mm Teamwork film, to include footage of an urban school board, since the board depicted in the current version of the film was clearly in a more suburban/rural setting. Some of NSBA's important clients, it was pointed out, are urban school systems, whose boards would not relate well to the board depicted on film.

Expert Review

The final formal review of materials was carried out by Dr. Keith Goldhammer of Michigan State University, selected because of his long standing interest in school boards and his standing in the community of scholars.

Dr. Goldhammer was asked to review each package with respect to the following questions:

A. Adequacy of content:

- o Is the content adequately based on research, authoritative literature, and/or widely accepted practice?
- o Is the content presented with conceptual clarity appropriate to the intended users, i.e., school board members?
- o Do the goals and objectives set forth reflect the knowledge base referenced in the rationale and leader's guide sections?
- o Is the content adequate in terms of length and breadth of treatment of the subject matter?

B. Clarity of purpose and objectives:

- o Are the goals and objectives clearly stated?
- o Are the goals and objectives appropriate to the needs of the intended users, i.e., school board members?

C. Consideration of school board roles and performance:

- o Are roles and performance adequately perceived and stated?
- o Are roles and performance adequately examined?

D. Usefulness of participant materials (Resource Section) provided:

- o Are the materials likely to stimulate meaningful workshop activity on the part of participants?
- o Do the workshop materials afford adequate opportunity for participant input to the workshop deliberations?

E. Workshop strategies:

- Do the workshop activities afford adequate opportunity for participant input to the workshop deliberations?

- Without prescribing "cut and dried" solutions, do the workshop activities examine alternatives and lead participants into an informed decision-making process?

In a letter accompanying his written report, Dr. Goldhammer reflected his overall impression that "...although I may appear to be very critical of the materials, I am confident that they are extremely well done, that they are reflective of the 'state of the art,' and that they will be received most constructively by board members and administrators."

The concerns raised by Dr. Goldhammer included the following:

- Content: Do we try to offer too much? Is there a real and too frequent information overload? Are we careful about professional jargon? Do we need to more carefully and consistently provide for summarization activities? Can we assure that leaders do not emphasize content coverage at the expense of meaningful participant involvement? How do we promote "safely" and effectively the flexible character of the materials offered?

- Targeting Rationale: Can we more consistently and explicitly "target" information provided in the rationale section for specific use by the leader? Should some such materials be summarized in laymen's terms for the participants? Can we assure adequate leader preparation in assimilation of information provided in both the rationale and strategy sections?

- Role Definition and Organization Theory: How do we deal with rejection of Brodinsky's Four Functions Model? Are we at odds with widely accepted models of organizational performance? Can we draw up a model of functional structure and role performance which will allow us to review each package with a consistent view about role definition and productive behaviors?

- o The Time Frame Issue: Can we reconsider more realistically the time frame required for various packages? Should we be quite specific and adamant about what is possible?

- o Size of Participant Group: Should we strongly suggest limitations of number of participants allowable with reasonable expectations for participant involvement?

Program Actions Resulting from the Reviews

After careful discussion and analysis of the information from the three formal reviews of Keys materials, program staff embarked upon a final revision of all workshop packages, and of the Teamwork film.

- o Format organization:

  Following the recommendation of the NSBA staff, a six-part organization of materials was adopted for the revision process, to include:

  1. Introduction
  2. Planning the presentation
  3. Presenting the workshop
  4. Evaluating the workshop
  5. Resource materials
  6. Participant booklet

- o Modular organization

  Following the user review group recommendation, many of the workshop packages were redesigned in a modular fashion to allow for greater flexibility of use within varying time constraints.

- o Workshop procedures

  Workshop presentation procedures were spelled out in greater detail to give prospective workshop leaders specific directions in conducting each workshop.

o Duplication and overlap

Revisions were carried out to eliminate duplication of materials and activities among packages in the few instances in which this existed.

o Teamwork film

The film was revised to include footage of an urban school board, and to include graphic instructional material, directions for stopping points, and discussion questions.

o Specific references

Any references to specific state education organization, strategies, etc., were eliminated in the final revision process. As a result, all products are of a generic nature.

Part IV: Dissemination Activities

Program and project dissemination activities were planned and carried out with two objectives in mind:

1. To identify a mechanism for long-range and nationwide dissemination of materials
2. To test several approaches to capacity building with state associations of local school boards

Publication Agreement

The National School Boards Association, one of the partners in the project from the beginning, was identified by the Policy Board as the most appropriate organization to carry out the first objective--long-range and nationwide dissemination. NSBA, an affiliation of state associations, provides national leadership for the school board movement and has demonstrated an increasing interest and role in developing new materials and services for school board members through state associations.

Program and NSBA staff worked through several iterations of an agreement, whereby NSBA would publish and distribute the Keys materials to state associations on a national basis. Indeed, in 1982, NSBA initiated several activities designed to increase state association awareness and use of the Keys, including:

- A regional conference in St. Louis, attended by representatives of 12 state associations from the midwest and southern areas
- A regional conference in Boston, attended by association representatives from the northeast area (six states)

- Technical assistance (materials and training) provided to individual state associations in Michigan, Wisconsin, Illinois and New Hampshire
- A national meeting of executive directors of state associations in Washington, D. C., to develop awareness of the materials and their availability

Program Dissemination Activities

During 1981-82, program staff began working with state associations outside the northwest region in order to explore some of the requirements for effective dissemination strategies. NSBA staff were invited to join these efforts in order to formulate an understanding of dissemination problems and potential strategies.

In the fall of 1981, following a presentation of NSBA's Pacific Region meeting, the Arizona association requested one of the Keys packages. A program staff member, joined by a member of the NSBA staff, worked with personnel from this association to implement the Key program in a statewide series of workshops.

Later in the fall, program staff worked with personnel of the California association to demonstrate and practice the use of eight of the Keys packages in a simulation mode.

Program staff made presentations to the national meeting of state association executive directors in Washington, D. C. in January 1982. Project Policy Board members then assisted in explaining how they had implemented Keys workshops in their respective states.

Program staff assisted NSBA in presentations and simulations of Keys programs to representatives of 12 state associations in St. Louis in February.

In the summer of 1982, an article by Linda Shalaway about the project appeared in the CeDAR Newsletter. This article prompted inquiries from nearly one hundred educators throughout the country.

As a final dissemination activity, the program was represented at the Dissemination Support Services Seminar on Effective Schooling in Chicago, in October 1982. Large-group and small-group presentations were made about the project, materials, and importance of school boards in initiating and supporting effective schooling practices. An NSBA staff member participated with program staff in these presentations.

Summary

Because of funding reductions, direct program dissemination activities were greatly curtailed. Nevertheless, several important steps were taken, including:

- A signed publication agreement with the National School Boards Association, under which Keys materials will be published and distributed nationally
- A greatly increased awareness among state association leadership about the Keys, their potentials and their availability
- Actual use by some 20 state associations of at least some of the Keys
- Successful association implementation activities in several states outside the region
- Identification of at least two viable models or approaches to dissemination/implementation with state associations
- A greatly increased awareness of the project and materials through the CeDAR network and the DSS Seminar

Part V: Inventory of Products

The following pages contain a description of each of the workshop products produced by the Keys to School Boardsmanship Project. Each product is described in terms of:

- Rationale
- Objective/Outcomes
- Instructional Methods
- Materials
- Time Requirements
- Uses and Variations

BOARD/ADMINISTRATOR RELATIONS

American education is unique in its citizen control of schools. Preserving it requires continuous work and attention. The basic building block of a successful local school system is the working relationship a board has with its superintendent/administrative staff. Understanding and becoming skillful in board/administrative relations is fundamental to the success of this district operation.

This workshop reviews and examines the basic elements of these relationships. Its aim is to help school board members improve their skills and understanding of them.

What Do Participants Learn?

School Board members who participate in the activities in these workshops learn about:

- The importance of identifying and agreeing on clear definitions of the roles board members and administrators will play
- Communication patterns and techniques of listening effectively to each other
- The need for establishing clear goals for the board and district if evaluation is to be effective
- Ways to respond to the disruptive behaviors that may cause conflicts between a board and its administrators
- The underlying need for good district policies which support effective board/administrative staff relationships, building and maintaining trust and confidence between and among all participants

How Is The Workshop Presented?

The workshop leader engages members of a board and its chief administrators in activities to examine their working relationship. Through lecturettes and structured activities, participants review and analyze a number of promising ideas and practices. Local adaptation and application of workshop ideas is emphasized.

What Materials Are Used?

The loose-leaf notebook contains all the materials needed for the leader to prepare for, present and evaluate the workshop. Included are:

- Background papers about board/administrative relations
- Plans, ideas and suggestions for structuring the workshop

- Workshop designs
- Overhead transparencies
- Handout materials for the participants

How Long Does The Workshop Take?

Materials included could easily require a full 5- to 6-hour workshop day, or more. However, the topics within the package are organized in short modules ranging from 20 to 60 minutes each. Therefore, workshop times may be varied according to content desired and times available.

How Has The Workshop Been Used?

Several workshops were conducted with three to ten boards attending and using parts or all of the materials. Seating board members with their superintendent and administrative staff is the ideal arrangement since applying the ideas and exercises to their own situations is most meaningful to the participants.
Parts of the workshop have also been presented at regional meetings, and at annual convention clinic sessions.

BUILDING BRIDGES: SCHOOL BOARD MEMBERS' POLITICAL ROLES

In the dynamic and changing education politics of our time, school boards and their members have important, even crucial, contributions to make as the major representatives of the local control tradition.

This workshop develops an awareness of boards' political responsibilities and roles at the local and state levels and examines coalitions as a major "bridge building" strategy.

What Do Participants Learn?

Board members and administrators participating in this workshop learn about:

- Political roles at the local level, including why board members are elected, public perceptions of school board representation, different ways to go about representing constituencies, strategies for being a responsive board, and patterns of influence on the board. (Unit 1)

- Political roles at the state level, including trends of public opinion regarding local control, the authority of the state education agency, and suggestions for involvement in the legislative process. (Unit 2)

- The need and opportunities for coalition-building with organizations within and outside of public education. (Unit 3)

Participants engage in a number of learning activites in order to gain information and insight into the political dimensions of their school board responsibilities. They discuss issues with one another, respond to written questionnaires and quizzes, hear and respond to information presented by the workshop leader.

How is This Workshop Presented?

The workshop leader conducts the units of this workshop through a series of structured individual, small and large group activities.

Among these are:

- Identifying board members' approaches to representation

- Analyzing strategies for communicating with legislators

- Identifying legislators' attitudes toward schools, and creating dialogue with them about common concerns

- Analyzing coalition potentials with several kinds of interest groups within and outside of the education family

- Presentations of information from Gallup Polls and research

What Materials Are Used?

The workshop leader's manual contains all necessary materials for presenting the workshop, including:

- Background information
- A planning guide
- An outline of workshop procedures
- Overhead transparencies to aid in presenting information

Participants receive a workshop booklet containing questionnaires, idea papers and information pieces.

How Long Does The Workshop Take?

The units of the workshop can be delivered separately, or combined for a longer presentation. Time frames for the units are:

Unit 1:	The Local School Community	3 hours
Unit 2:	The State Arena	5 hours
Unit 3:	Coalitions	3 1/2 hours

How Can This Workshop Be Used?

The workshop has several potential uses. It can be delivered to the general school board membership in regional or statewide conferences as an awareness activity. It can also be delivered to legislative committee or assembly members as an orientation and planning activity for legislative involvement.

COMMUNICATING WITH THE COMMUNITY

With increasing public disenchantment with public schools, the communication role of locally elected school board members becomes even more critical. This workshop is designed to assist board members to examine the needs and potentials for communication in their communities, and to outline an action plan to improve it.

What Do Participants Learn?

Through participation in this workshop, board members and superintendents learn:

- The latest Gallup Poll trends in public sentiment toward the schools
- The need for an ongoing communications program
- The need for communications policies, plans, and evaluation of impact
- How to analyze communication channels within the school community
- That individuals can make a difference

How Is The Workshop Presented?

The workshop leader employs a series of overhead transparencies to convey poll information to participants. Participants complete several opinion questionnaires, analyze their communities and school organizations for communications potentials, and develop individual and board plans of action to improve communication.

What Materials Are Used?

The leader's notebook contains all necessary materials for presenting this workshop, including:

- Background information
- Guidelines for conducting workshop activities
- Overhead transparencies to aid in presenting information and ideas

Participants receive in their workshop packets several sample opinion polls, worksheets, and informational handouts.

How Long Does The Workshop Take?

This is designed as a 3-hour workshop. It can be modified for a shorter time period.

How Has This Workshop Been Used?

It has been conducted primarily at regional and state-wide meetings of boards and superintendents. With modification, it can be used with a single board.

CONFLICT: ALTERNATIVES TO BLOWING A FUSE

School boards increasingly find themselves in the midst of controversy and conflict. School closures, text and library book selection, curriculum offerings, and many other issues fuel these controversies in the local community.

This workshop is aimed at increasing board members' understanding of conflict, and their leadership roles in managing it.

What Do Participants Learn?

Through participation in workshop activities, board members learn about:

- Typical causes of conflict, including differences in values, perceptions, goals, position within the organization, and role pressures
- Typical group dynamics involved in conflict situations, including escalation, peer pressure, entrenchment
- Individual styles of handling conflict, including strengths and weaknesses of each
- Typical strategies for managing conflict situations, including win-lose, negotiating, and problem solving
- The differences between managed and unmanaged conflict, as well as conflict management and conflict resolution

How Is This Workshop Presented?

The workshop combines presentations by the workshop leader, individual activities and structured small and large group discussion, and solving typical school board problems involving conflict.

Application of the ideas, techniques, and strategies to "back home" conflict situations is emphasized.

What Materials Are Used?

A loose-leaf notebook contains all materials needed by a workshop leader to prepare for, present and evaluate the workshop. Included are:

- A background concept paper
- Suggestions for structuring the workshop
- Guidelines for conducting the workshop
- Overhead transparencies to assist in making presentations

Each workshop participant receives a packet of materials for use in the workshop. Included in this are idea papers, information about conflict styles, and case problems in conflict to be solved.

How Long Does The Workshop Take?

The workshop is designed for a 3-hour period, but has been conducted in 1½ hours. The longer time allows for a fuller development of the workshop themes, and for participants to get more benefit from the activities and discussion.

How Has The Workshop Been Used?

Most often, the workshop has been conducted with board members and administrators from several school districts, on a regional basis. This allows for exchange of ideas and experiences. With modification, it can be conducted with a single board and superintendent. It has also been used in convention clinic sessions. When the whole board and superintendent participate together in the workshop, more direct application and impact of workshop ideas can be expected.

EFFECTIVE SCHOOL BOARD MEETINGS

It is only at the school board meeting where business of the school district can be legally conducted. Few board members have had opportunity to learn effective methods and processes for running them smoothly and efficiently. The focus of this workshop package is to use the knowledge and skill of experienced board members as well as the findings of recent behavioral research for the improvement of board meetings.

What Do Participants Learn?

By actively participating in workshop activities board members learn about:

- The vital importance a good agenda plays and new ways to make it more effective
- How to clarify the roles board members and administrators have at meetings and whose responsibility it is to do what
- Leadership responsibilities at meetings with a focus on the chairman's role
- Decision making, "how to decide" and new and revised parliamentary procedures
- Interpersonal communication skills of listening and face-to-face relationships
- How boards use their meeting time
- Legal requirements for board meetings
- How board policies on meetings can aid boards in becoming more effective

How Is This Workshop Presented?

The workshop leader employs quizzes, activities, and brief lecturettes to involve board members and their superintendent in discussions about their own meetings. Because they are seated together, their discussions can result in direct application to their own meeting procedures. Participants keep a running record for helpful ideas and suggestions for further discussion "back home."

What Materials Are Used?

The leader's loose-leaf notebook contains all the materials needed to prepare for, present and evaluate the workshop. Specifics include:

- A background paper and some recent research findings
- Ideas and strategies for organizing the workshop

- o Overhead transparencies to assist the leader's presentation
- o A wide variety of handout materials for participants

How Long Does The Workshop Take?

The seven modules range in length from 15 to 30 minutes or a total of 3 to 4 hours if they are all utilized. A minimum of 1½ to 2 hours is recommended in order to cover several of the modules.

How Has The Workshop Been Used?

The workshop has been most effective when several boards and their superintendents have met on a cluster or regional basis. Some of the modules have also been used in larger meetings and at annual state conventions.

THE EDUCATIONAL MANAGEMENT TEAM

As an approach to school district governance and decision making, the management team concept is gaining appeal among educators and school board members. The three workshops included in this package are designed to help school district management teams at various stages of their development.

What Do Participants Learn?

Through participation in workshop activities, board members and administrators learn about:

- The management team concept
- Roles of board, superintendent, principals and others in management team organization
- Various forms of management teams, along with the benefits and problems of each
- Planning and procedures for establishing a management team
- Problem solving skills in initiating a management team
- Alternative approaches and procedures in evaluating management team effectiveness

How Are These Workshops Presented?

The first of these workshops, "An Introduction and Orientation to the Management Team," is intended for those who are interested in the concept and in learning more about it. It is typically presented to groups of board members and administrators in a convention clinic or special interest setting, or on a regional workshop basis.

The other two workshops in the package, "How to Initiate a Management Team," and "How to Evaluate a Management Team" are intended for single district application, to contribute to implementation and evaluation of management teams already established.

What Materials are Used?

The loose-leaf Leader's Guide contains all materials needed by a workshop leader to plan, conduct, and evaluate the first workshop session. Also included are planning guidelines for providing consultation assistance in implementing and evaluating management teams. The package contains overhead transparencies to aid the leader in making the presentations.

Participant Booklets include information sheets, worksheets, sample policy statements and other materials for use by workshop participants in analyzing the management team concept and procedures.

How Long Do the Workshops Take?

The "Introduction and Orientation" workshop is designed for a 2 hour to 2-3/4 hour presentation. The "How to Initiate a Management Team" presentation requires two full days of activity. The "How to Evaluate" presentation is designed as a consultation activity and has several variations and time requirements.

How Have the Workshops Been Used?

The "Introduction and Orientation" workshop has been used with board members and administrators in regional and statewide conferences and clinics. The "How To..." consultation presentations have been used with individual district management teams.

POLICY DEVELOPMENT

Where does policy come from? Why have policies? What is a thorough policy development process?

These are some of the questions answered in this workshop on policy development.

What Do Participants Learn?

Through participation in this workshop, board members learn about the following:

- The place of individual values in the policy process
- The place of community values, traditions, and expectations in policy development
- The uses of policies and their contribution to local control of schools
- Board and superintendent roles in the policy process
- Positive ways in which individual board members can make a difference in the educational system

How Is The Workshop Presented?

The workshop leader employs a 16mm film to present many of the concepts during the workshop. Participants engage in discussion and structured activities at planned stopping points during the film presentation.

What Materials Are Used?

The workshop leader's notebook contains all materials needed for the presentation. Included are:

- Background information
- Guidelines for presenting the workshop
- Overhead transparencies to aid in the leader's presentation
- A 16mm color/sound film for use in presenting workshop content

Participant's materials include worksheets, instructions for activities, and information handouts.

How Long Does The Workshop Take?

Three hours is required to achieve all of the workshop activities, including skill development components. The film and selected handouts can be used in less time as a review of the policy process.

How Has This Workshop Been Used?

Primarily used with board members and superintendents in regional and statewide meetings, the workshop can also be presented to single boards. It can serve as a valuable introduction to the topic in new board member orientation sessions.

POLICY IS POWER

School boards are, by legislative intent, policy making bodies for local school systems. Yet, many boards may not fully exercise this policy making power.

This workshop engages board members and administrators in a step by step "how to" approach to policy making.

What Do Participants Learn?

As participants in this workshop, board members and administrators, working as a unit, learn about:

- Policy as an outcome of a systematic process
- Board and superintendent roles in formulating policy--it's a dynamic "give and take"
- The place for individual values in the policy process
- Community expectations for board members
- The relationship between policy and regulations

How Is This Workshop Presented?

The workshop leader uses a series of overhead transparencies to present the ideas and concepts involved in the workshop. Participants engage in structured activities and discussion in adapting the suggestions to their own policy problems. Attention is given to typical problems that arise in the normal policy making activities of a school board and superintendent.

What Materials Are Used?

The workshop leader's notebook contains all materials needed to plan, conduct, and evaluate the presentation. Included are:

- Background information
- Guidelines for conducting the workshop
- Overhead transparencies to aid in the leader's presentations

Each participant receives a workbook depicting the policy making process. The workbook is keyed to the leader's presentation and contains a case example of a policy developed from "beginning to end."

How Long Does The Workshop Take?

The workshop can be presented in an hour as a quick review of the policy process. Three hours is needed for the analysis and skill building components.

How Has It Been Used?

The workshop has been used with individual boards, at regional meetings and in annual convention clinic sessions.

PROGRAM EVALUATION: SCHOOL BOARD ROLES

In a period of increasing public concern over the quality of education and the effective use of taxpayers' dollars, school board members need to have some answers.

This workshop develops an understanding about how school boards and their members can get the information they need about school programs, and how evaluation judgments affect board decision making.

What Do Participants Learn?

Board members and administrators learn about the following:

- Board and staff roles in evaluating school programs
- Evaluation as a process of gathering information and making judgments
- Essential questions to ask about school programs
- Adequate and questionable bases for evaluation judgments
- The importance of a policy-based, planned and systematic evaluation effort

How Is This Workshop Presented?

The workshop leader employs lecturettes, structured activities, and case problems to guide participants in the workshop. Included are a role clarification activity, program description and program impact exercises, decision making problems involving program evaluation, and more.

What Materials Are Used?

The leader's notebook contains all materials necessary to plan, conduct, and evaluate the workshop. It includes:

- Background information
- Guidelines for conducting the workshop
- Overhead transparencies to aid in presentations

The participants packet of materials includes objectives, instructions, worksheets, case problems, and information handouts.

How Long Does The Workshop Take?

The workshop is designed for 2½ to 3 hours, in order to achieve the fullest benefit for participants. It can be presented in modified form in a shorter period.

How Has This Workshop Been Used?

It has been presented primarily at regional workshops and annual convention clinic sessions. With modification, it could be used with a single board, as a review of program evaluation issues.

WHAT DO SCHOOL BOARDS DO?

Reliable information about education or what it takes to be a successful school board member is often not readily available to a citizen who is running for the local board. While this workshop is not an attempt to teach campaign tactics or strategies it is an attempt to provide factual educational information and access to resources. It will also aid the candidates' knowledge about the role school board members play and the arenas in which they operate.

What Do Participants Learn?

School board candidates attending this workshop learn:

- About the size, nature and organization within their state
- What the basic functions of a board are
- What information services are available from the school boards association
- Where additional information is available
- Answers to their questions

How Is This Workshop Presented?

The workshop has a balance of activities including viewing transparencies, participating in a small group exercise, receiving informational materials, listening to short presentations and being involved in a question and answer period. Since this is primarily an informational workshop, increased information and awareness are emphasized rather than the attainment of specific skills.

What Materials Are Used?

The leader's loose-leaf notebook contains the suggested workshop format and the materials to be used. Since the actual information varies state to state, the samples shown will need to be adapted to fit each state's unique qualities. Transparencies, for example, and some of the written materials will need to be tailored to each state educational system. A checklist is included in the leader's guide to assist in this process.

How Long Does The Workshop Take?

This workshop is tightly scheduled and is designed to be conducted in 2 hours.

How Has The Workshop Been Used?

This workshop has been scheduled in various locations throughout a state in order that participants' travel and expense be minimized. Workshops have varied in size from 25 to over 100.

SCHOOL BOARD SELF-ASSESSMENT

One way in which top management can provide effective leadership in a school system is through example. The self-assessment procedure engages a school board and its chief administrators in examining key areas of board responsibility and performance, and in establishing priorities for improvement. As a result, the board sets new goals for its own operation, establishes strategies to reach them, and clarifies roles among members of the team.

What Do Participants Learn?

Through participation in the self-assessment procedure, board members and administrators learn about:

- Six factors which contribute to effective board and management team operations, including planning, policy, interpersonal relations, communications, and more
- The importance of establishing and maintaining a balance between team actions and individual needs
- Areas of satisfaction and of improvement in management team operations
- Setting targets for smoother management team operation
- Clarifying roles in school board leadership

How Is The Procedure Conducted?

The self-assessment procedure differs from the workshop presentations described in other parts of this catalog. It begins when members of a board complete the self-assessment questionnaire, and return it to the state association offices. Association personnel tabulate the information and prepare a "profile" report for the board. During a scheduled worksession, the information is reported to the board and administrators involved. Areas of satisfaction and those for improvement are identified and discussed. The worksession ends when the board has identified goals and plans for improvements in selected areas.

What Materials Are Used?

The leader's notebook contains all materials necessary to carry out the self-assessment procedure. Included are:

- A background concept paper
- Instructions for tabulating the questionnaire information
- Overhead transparencies for use in making a report to the board
- A camera ready self-assessment questionnaire

How Long Does The Procedure Take?

A quick and timely completion of the procedure has proven to be most effective. The report and worksession should occur as soon as possible after the board's completion of the questionnaire.

The questionnaire itself takes 15-30 minutes to complete. The report and worksession can be conducted in 1 1/2 hours.

How Has The Procedure Been Used?

The self-assessment procedure has been used with numerous individual school boards and their chief administrators. The worksessions have been conducted during regular, public meetings of the board, or in special board inservice sessions. Presentations about the procedure and demonstrations of it have been given at annual conventions and regional meetings of board members.

SCHOOL IMPROVEMENT: A CRITICAL FUNCTION OF SCHOOL BOARDS

The School Improvement Workshop is comprised of an introduction, four activity units and a closing summary and evaluation activity. The workshop stresses the school board's responsibility to provide for a quality program of instruction and procedures which have proven effective in dealing with that school board function.

What Do Participants Learn?

The workshop presents activities addressing the following topics:

- Reaffirming the school board's responsibility to attend to the improvement of instruction
- Identifying effective school board behaviors
- Clarifying expectations through goals and objectives
- Reviewing elements of effective schooling validated by recent research
- Implementing improvement of instruction through the policy development process
- School improvement as the focus of collective bargaining

How is This Workshop Presented?

The workshop combines presentations by the workshop leader with structured group activities and participant discussions.

Background and introductory information is provided, participant reaction and contributions are solicited, and applications are developed.

What Materials Are Used?

The Leader's Guide contains everything needed to plan, conduct and evaluate the workshop. Included are:

- Background information
- Transparencies
- Planning guide for leader
- An outline of workshop procedures
- Materials for participants including workshop exercises

How Long Does the Workshop Take?

The workshop, if fully developed, will require 3 1/2 to 4 hours. The time can be curtailed by omitting or skimming certain units.

How Can This Workshop Be Used?

The workshop can be delivered to groups of as many as 60 by a workshop leader working alone. More participants can be accommodated if additional leader support is provided. The workshop could be adapted to use with a single board if participant exercises are replaced by desired local activities.

TEAMWORK: THE BOARD AND SUPERINTENDENT IN ACTION

Establishing and maintaining a constructive working relationship with the superintendent is an essential ingredient of school board effectiveness. This workshop emphasizes the basic principles of this "teamwork" between board and superintendent.

What Do Participants Learn?

Participants in the workshop learn a basic philosophy of Teamwork from a presentation, on film, by Dr. Jack Ramsay, Coach of the Portland Trailblazer Basketball Team.

They are exposed to five basic teamwork principles:

- The importance of commonly held goals for the team
- The importance of a "game plan" to achieve team goals
- The importance of regular evaluation of team performance
- The importance of defined roles and role playing in teamwork
- The importance of trust among team members

Participants observe and critique the teamwork behaviors of a board and superintendent on film. They then apply the workshop ideas by discussing their own goals and priorities, and by clarifying board and superintendent roles in typical school district decisions.

How Is This Workshop Presented?

The leader conducts the workshop through a series of structured individual, small and large group activities. These include:

- Viewing, discussing, and critiquing the teamwork behaviors of a school board and superintendent on film
- Completing and discussing a goal and priority activity, based upon school district instructional goals
- Completing and discussing a role identification and clarification activity based upon typical school district decisions

What Materials Are Used?

The leader's manual for the workshop contains all information needed to present the workshop. Included are:

- A background concept paper

- A transcript of Dr. Ramsay's remarks
- Guidelines for organizing and conducting the workshop
- Overhead transparencies to assist in the leader's presentations
- A 16mm color/sound film, featuring Dr. Jack Ramsay and a school board and superintendent in simulated board meeting.

Each participant receives a packet of materials to use in the workshop activities. Included in this packet are information sheets about teamwork principles, questions to answer in critiquing the film, goal and role clarification activities, and a workshop evaluation form.

How Long Does The Workshop Take?

In order for participants to benefit fully from the workshop activities, a 3-hour time period is needed. If the workshop is conducted in less time, the leader will need to cut out some of the workshop activities.

How Has This Workshop Been Used?

Typically, this workshop has been presented to school board members and superintendents meeting together on an area or regional basis. With modification, it can be presented to a single board and superintendent. It has also been used in orientation sessions for newly elected school board members, and during convention clinic sessions.

Addendum to Final Report

Question 1: How did the project grow from the original seven topics to thirteen workshops as described on pages 5 and 7 of the Final Report?

Answer: The seven topics as identified by the Policy Board were broad areas of need for information and perspectives by school boards, rather than specific workshop topics. Workshops were then developed using the seven broad topics as a framework. In some cases, more than one workshop was developed within a topic area, in order to address different dimensions of the issue. Examples are *Policy Development* and *Policy is Power* in the policy area, *Board/Administrator Relations* and *Teamwork: The Board and Superintendent in Action* in the board/administration area, and *School Board Self-Assessment* and *Program Evaluation* in the evaluation area.

Question 2: What is the status of the cross referencing document, "A Key to the Keys," mentioned on page 15 of the Final Report?

Answer: While this document was identified as one which would be a useful companion piece to the entire set of the *Keys*, time and resources did not permit its development. It would, however, be a valuable contribution to the entire set of materials and could be developed at a later time.